

AN IT MANAGER'S GUIDE

Contact center technology migration playbook

Make your next move with
confidence

 GENESYS™



Introduction

Business opportunities continue to drive migrations to the cloud. And with the current volatility of local and global markets, the advantages gained through its agility and resiliency are even more valuable. Cloud migration also gives you an opportunity to evaluate your operating models and discover what works best for you on top of a future-proof, secure and resilient platform. By understanding processes and planning best practices, you can reduce the risks associated with any migration.

This playbook gives you a running list of the people you should identify and the tasks you should complete to set yourself up for success in moving to a cloud contact center.



Before you start, read this guide to prepare you and your organization for your evolution. This includes developing a plan that secures the buy-in of key stakeholders and building a business case for the resources you'll need.

Then take the following steps to assemble your project team, assess readiness and make key decisions about your contact center technology migration and implementation.

[Start reading](#)

STEP 1

Assemble your project team

Ensure you have the right set of stakeholders, partners and subject matter experts on hand to make the transition smooth. Depending on the size of your organization or complexity of your migration, you might not have some roles assigned or some roles might be combined for various components you're migrating.

Business sponsor

- Articulate business vision and goals
- Identify needed people and provide funding
- Oversee the successful deployment and adoption of the cloud platform

Project manager or scrum master

- Create an internal project scope and timeline
- Align and oversee participation of all necessary people
- Collaborate with Genesys or your partner's implementation project manager or scrum master

- Facilitate and direct work according to a release plan
- Organize and facilitate sprint ceremonies and meetings

IT and network administrators

- Perform all troubleshooting and support for internal teams
- Ensure a robust network and environment that's free of any latency or jitter
- Understand and manage all system interdependencies
- Serve as the main point of contact for any network, telecom or infrastructure issues

Contact center supervisor or management

- Provide business requirements and participate in Core Model definition activities
- Articulate customer experience and digital engagement strategies

- Manage all scheduling, training, reporting, forecasting and KPIs
- Use solution daily
- Manage and monitor call center personnel (agents)



Pro tip: For larger call centers, using an Agile Methodology can streamline your overall migration and improve efficiency. Breaking down deliverables into incremental activities gives you quicker wins – instead of waiting for the entire initiative to be completed.

Pro tip 2: Get buy-in from each team member in advance. Nobody likes a surprise task.

Developer

- Find a web developer familiar with RESTful-based API
- Ensure integration with backend applications and services via API, webhooks, web service data dips and more

Cloud platform provider or other third-party experts and admins

- Ensure cloud admins are trained and certified
- Work in scrum teams, if possible, to facilitate technical requirements
- Perform simple configuration tasks: set and manage users, groups, call flows, queues and scripts
- Perform simple moves, adds, changes and deletes

Security and compliance officer

- Confirm the solution meets multiple regulatory compliance levels
- Verify data encryption, storage location and how it handles customer data
- Discuss network requirements, voice readiness and integration to third-party applications
- Ensure you'll have operational support and agree on ITIL service management practices



Start planning your cloud migration roadmap

[Get the checklist](#)

STEP 2

Conduct an overall audit of your current solution

As you assess your on-premises contact center solution, create an inventory of all the required capabilities, integration points, security requirements, remote work requirements and functional requirements. Consider your infrastructure and networks, how voice gets into your network and how data traverses your network.

1. Assess and design your new cloud architecture

- Look at bandwidth requirements across your environment. Understand the volume of calls you can push through your bandwidth and SIP trunks.
- Depending on where your agents are connecting, you must understand which network port ranges need to open to enable web-based softphones.
- Ensure you set the right network policies, security and permissions for voice to traverse with minimal delay.

2. Identify interdependencies to connect to a cloud solution

- Set up security exceptions on network firewalls and security devices.
- Assess the reliability of internet connections at all company locations.
- Work with your internet service provider to ensure you have a fully redundant internet connection.

3. Establish a high quality of voice and video traffic on your network

- Enable Quality of Service on your routers, switches and wireless devices.
- Establish minimum performance target metrics for latency and packet loss.

4. Review these other technical requirements for telephony and communications

- Staff computing devices and virtual desktops
- Set up local security exceptions on computing devices, ensuring continued access to the cloud solution
- Agent endpoints
- Data and media protection
- Interconnectivity with existing Unified Communications systems

Pro tip: [Genesys Professional Services](#) and our [AppFoundry® Marketplace partners](#) use time-saving tools to perform a voice quality assessment across your environment. The reports from this assessment can help you determine whether you're ready for VoIP.

STEP 3

Conduct an overall audit of your current solution

No matter which implementation method you choose, you need the right combination of experts from a wide range of disciplines working together to provide a clear path forward.

Provider-led implementation

- Do you want hands-on expert training to set up and configure key capabilities?
- Are the provider's services onsite?
- Will they work with your existing partner to provide oversight to ensure that best practices are used?
- Can they do the first few rollouts so internal teams can shadow and take over subsequent rollouts?

Partner-led implementation

- Will the partner only assist with deployment?

- Will the partner shadow the provider during the implementation in a "train the trainer" approach?
- Will you need assistance after go-live for changes and support?

Leading your own implementation

- Do you have the right in-house expertise for network and operational readiness reviews?
- Do you have in-house resources to achieve your go-live plan and business outcomes on time?
- What self-service training and resources are available?
- Do you have budget for professional services if issues arise, or can you use services from start to finish?
- What is your organization's risk tolerance?

Migration approach

- Decide whether to migrate all at once or in a phased approach.
- Identify which lines of business go first, depending on their business needs.
- Start small and learn, developing stronger skills as you progress.

Migration tools

- Take advantage of existing migration tools from your provider or partner. These will expedite some migration processes, including overall contact center configuration, call or IVR flows and more.



Pro tip: Leading your own deployment can be challenging. Be sure you have dedicated resources to ensure success. For more details, [let's talk.](#)

STEP 4

Getting ready for go-live

IT and network administrator

- Complete a technology and environment “map” of system interdependencies based on the audit in Step 2
- Decide on troubleshooting tools and what you need to prepare
- Complete your risk mitigation plan
- Test for lower risk rollouts
- Complete an integration plan
- Provide a migration map to your customer success manager

Project manager

- Document your go-live plan, with anticipated impacts
- Determine the go-live date
- Decide who in your company will monitor go-live
- For provider-led onboarding, determine who will monitor it

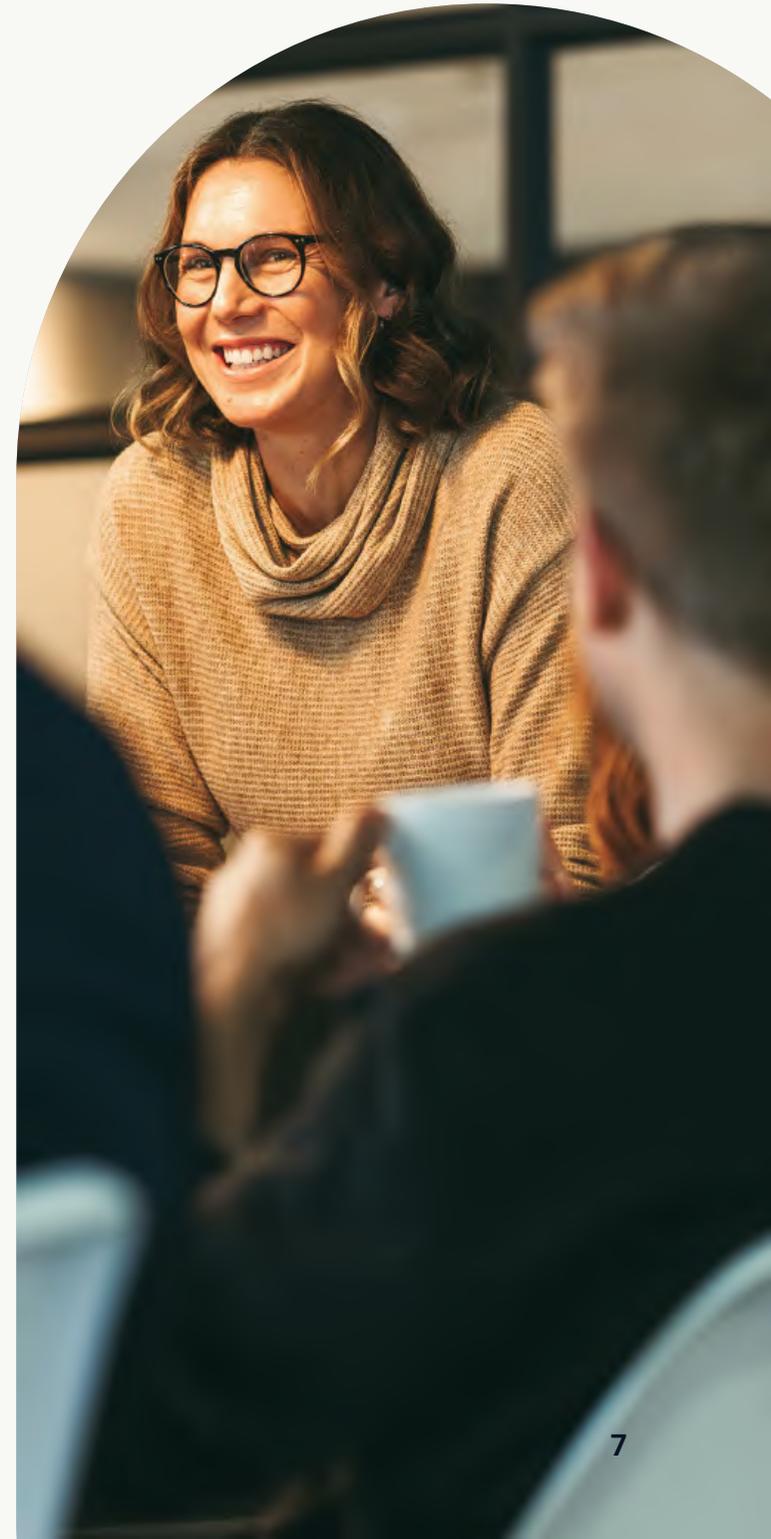
- For partner-led onboarding, decide who from the partner will monitor it
- Plan on how to process feedback from customers and agents and share with monitors

Key stakeholders

- Successful change management requires appropriate training for each stakeholder group:
 - Agents, supervisors and admins
 - IT managers and network admins
 - Plan for future hires and ongoing training



Pro tip: Consider the cadence of provider check-ins for a smooth transition during early adoption.



STEP 5

Working with Genesys

Adopting a new contact center solution goes well beyond the initial deployment. Genesys is with you all the way. We combine success planning with expert guidance and engagements to continually drive your goals and improve skills. Take advantage of our expertise and know you're not in this alone.

Whether you're a current Genesys customer or considering a migration from a different platform, Genesys Professional Services offer customer experience expertise and services that facilitate your ongoing success.



**Have questions
about how Genesys
Professional Services
can support your
migration?**

[Contact us](#)



About Genesys

Genesys empowers organizations of all sizes to improve loyalty and business outcomes by creating the best experiences for their customers and employees. Through Genesys Cloud, the AI-Powered Experience Orchestration platform, organizations can accelerate growth by delivering empathetic, personalized experiences at scale to drive customer loyalty, workforce engagement, efficiency and operational improvements. Visit www.genesys.com.

